

FIG. 2

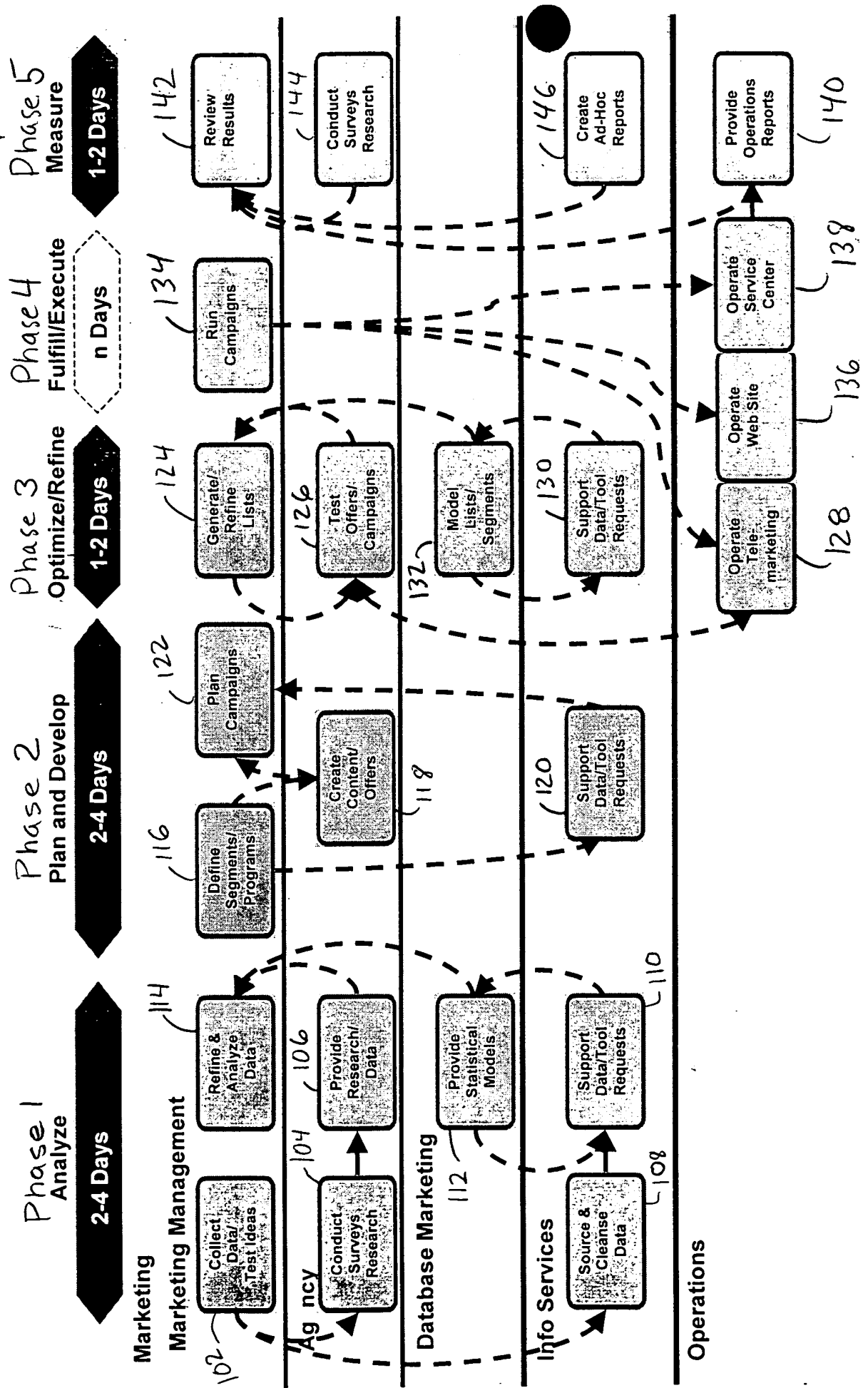


FIG. 3

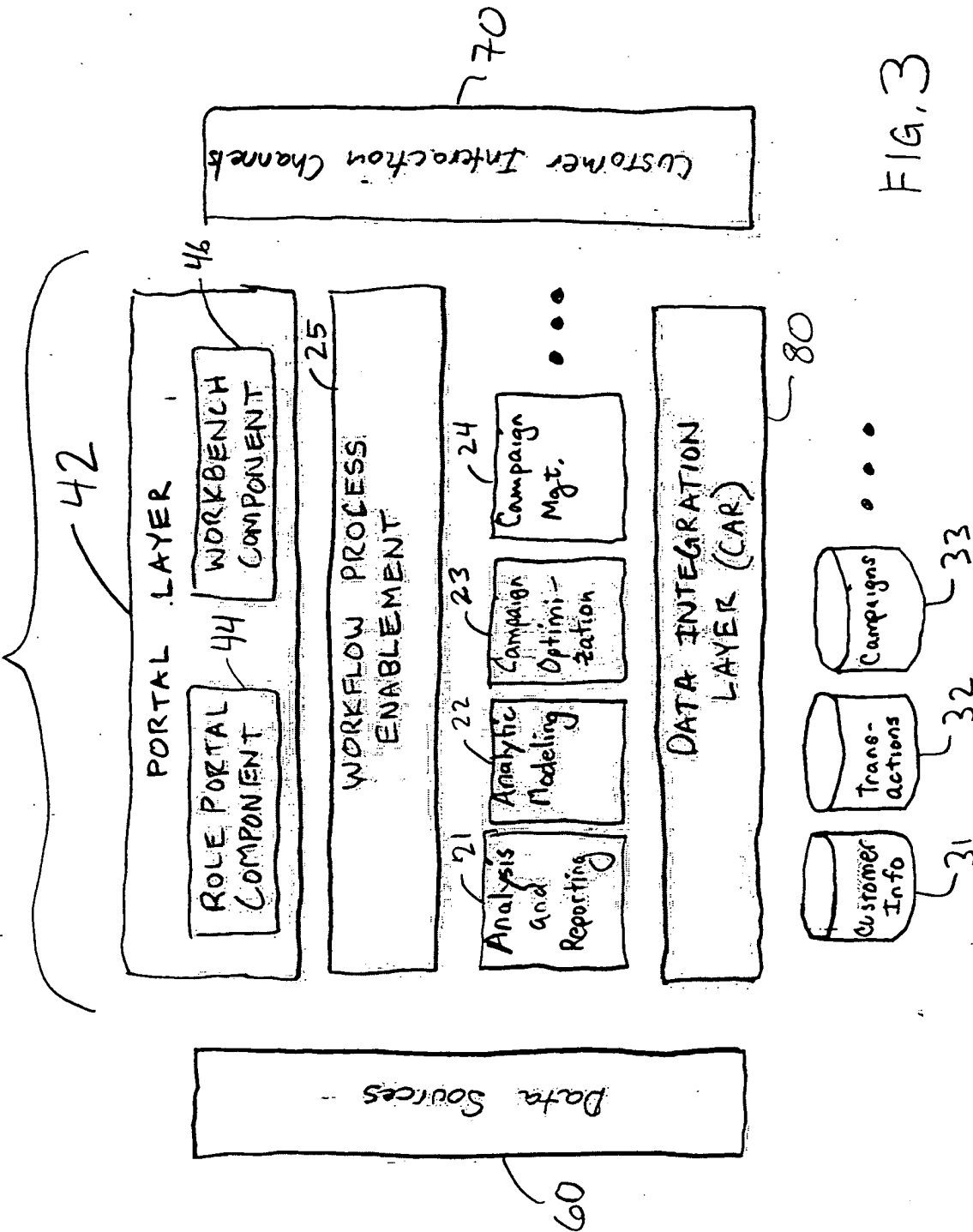


FIG. 3

FIG. 4

42

PORTAL LAYER

44

ROLE PORTAL COMPONENT

- EXECUTIVE
- MARKETING MANAGER
- DATA ANALYST
-
-
-

46

WORKBENCH COMPONENT

- HOMEPAGE
 - SCORE CARDS
 - TASKS (TO DO'S)
 - ALERTS
 - COMPANY NEWS
 - OTHER NEWS
 - WEBSITE LINKS
- ACTIVITIES PAGE
 - TASKS (TO DO'S)
 - RESOURCES AND REFERENCES
- MARKETING CAMPAIGNS PAGE
 - S/W APP. ACCESS
 - CAMPAIGN INFO AND METRICS
- CUSTOMER ANALYSIS PAGE
 - S/W APP. ACCESS
 - ANALYTICS

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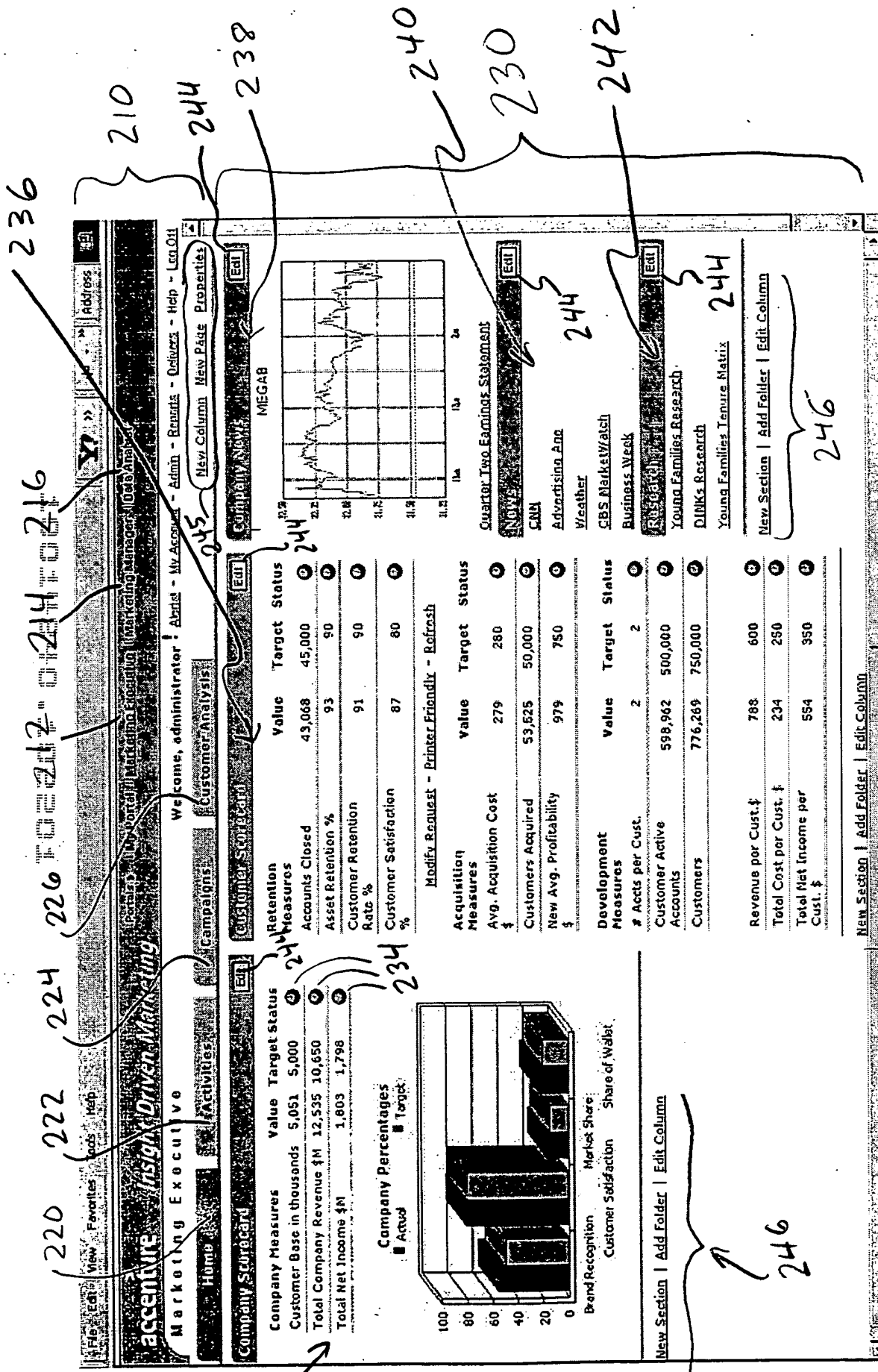


FIG. 5

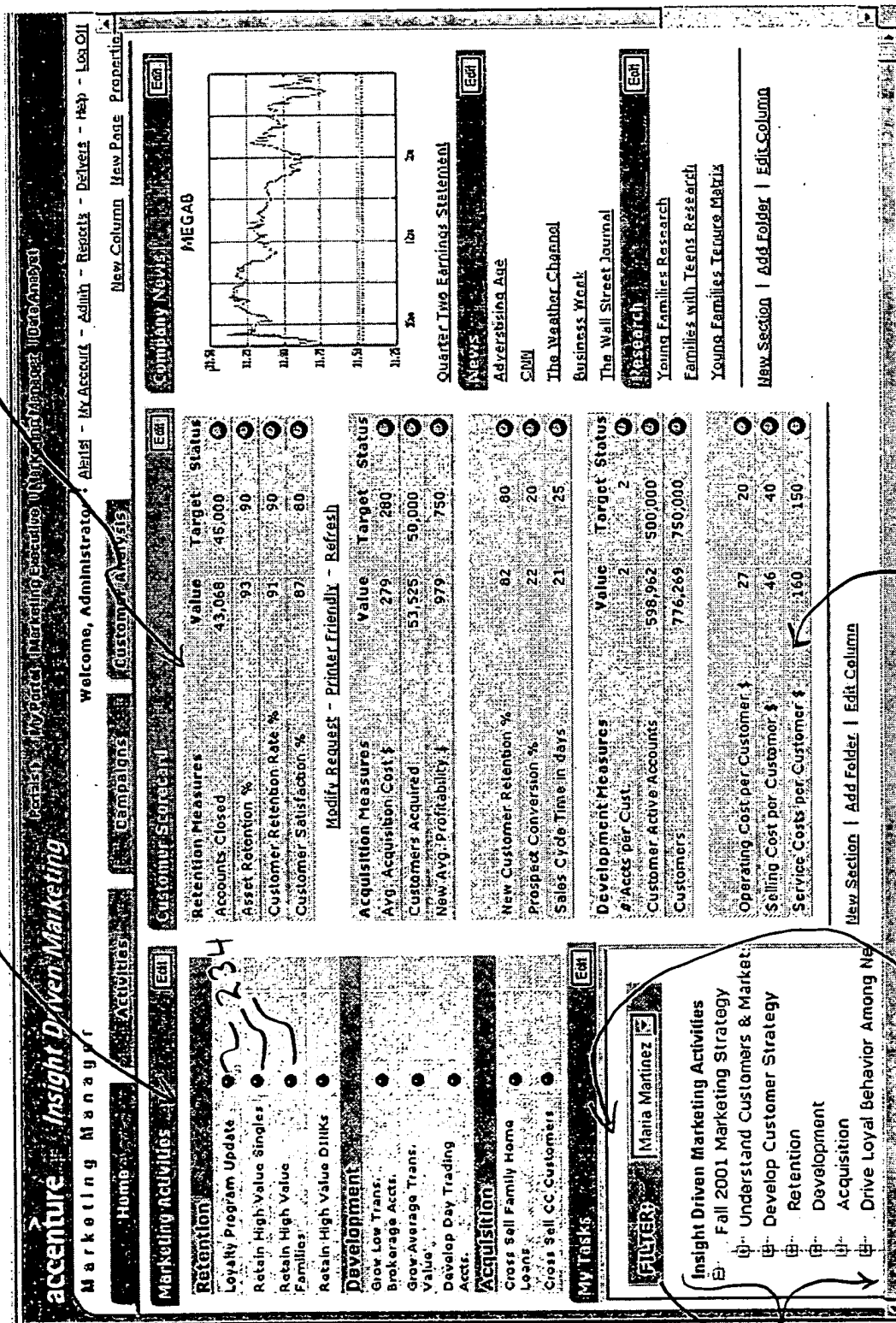
200
246

336

332

330

FIG. 6



352

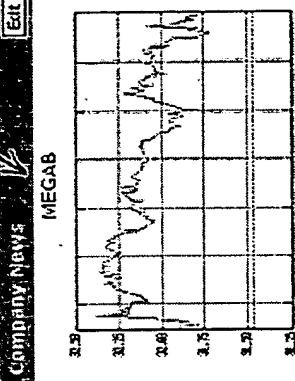
354

350

356

Marketing Activities		Est.
Retention		
Loyalty Program	•	
Update	•	
Retain High Value	•	
Singles	•	
Retain High Value	•	
Families	•	
Retain High Value	•	
OLDS	•	
Development		
Grow Low Trans.	•	
Brokerage Accts.	•	
Grow Average Trans.	•	
Value	•	
Develop Day Trading	•	
Accts. Options	•	

Campaign Supercard					
Program Type	Gaining Distribution	Contact Count	Response Count	Response Rate	Conversion Rate
Acquisition	Acquire Young Professionals	1,994,333	39,708	2.0%	34.9%
	Gross Sell Credit Card	2,477,560	123,804	5.0%	40.1%
	Consumers Gross Sell				
	Family Home Loans	13,855	570	4.1%	31.8%
	Develop Day Trading Accounts	20,823	800	3.8%	46.0%
Development	Grow Low Transaction Brokerage Accounts	917,858	45,787	5.0%	50.4%
	Loyalty Program Update	3,450,078	96,719	3.0%	39.8%
Retention	Retain High Value DINKYS	964,090	29,038	3.0%	30.4%
	Retain High Value Families	1,249,447	74,283	6.0%	44.9%
	Retain High Value Young Singles	1,712,870	34,063	2.0%	24.7%
	Retain Young Families	60,000	6,000	10.0%	10.0%



Quarter Two Earnings Statement

New

五

Weather

Advertising Age

Research

- Customer Analytic Record
- Brokerage Churn Model

■ Brokerage Churn Model

REFRESH

[New Section](#) | [Add Folder](#) | [Edit Column](#)

[New Section](#) | [Add Folder](#) | [Edit Column](#)

FILTER: Dan Duli

Insight Driven Marketing Activities

Fall 2001 Marketing Strategy

Understand Customers & Markets

(d) Develop Customer Strategy

WOMEN'S

Acquisition

Drive Loyal Behavior Among

Win-back Initiative to Rec

Defection Prevention Progn

1. The first step in the process is to identify the problem or issue that needs to be addressed. This involves gathering information and understanding the context of the problem.

450

09h

Fig. 7

440

442

accutune Insight Driven Marketing

Marketing Executive

Home

Activities

Campaigns

Customer Analysis

Welcome, Administrator! Alerts - My Account - Admin - Reports - Delivers - Help - Log Off

New Column New Page Properties

Task Details

FILTER

Maria Martinez

Insight Driven Marketing Activities

- Fall 2001 Marketing Strategy
- Understand Customers & Markets
- Develop Customer Strategy
- Retention
- Development
- Acquisition
- Drive Loyal Behavior Among Newly Acquired Customers
- Win-back Initiative to Recent Defectors
- Defection Prevention Program
- Initiate Program
- Initiate Customer Strategy

Task Details

Assignee: Maria Martinez - Marketing Campaign Manager

Phone Number: (612) 277-8778

Work Item: Initiate Program

Status: Impacted

Date Assigned: 20-Jul-01

Date Due: 25-Jul-01

Input Forms: Input Program Name

Description: To start a new program strategy process, open the attached form and enter an identifying name for this process. This name will be used to maintain relationships later on in the process (es)

Actions

Continue

Reassign

Online Reference

R09 Company Assessment-RPI report.doc

R20b Objectives Memo.doc

R20 Business Objectives-KPI Report.doc

560

554

530

565

FIG.8

[Modify Request](#) - [Printer Friendly](#) - [Refresh](#) - [Download Onto](#)

876 of 1000 882

FIG. 11

File Edit View Favorites Tools Help

accenture Insight Driven Marketing

Data Analyst

Home Activities

Launch Analytical Modeling Tool

Add an Analytical Report

Please enter only the name of the folder of the Analytical Report that was created. (*Required field)
Rename or Delete a link.

*Folder Name:
Folder Alias:
(If you would like to enter a more descriptive text for the link name)

Segment Overview

Customers by Segment

■ Dinks

■ Empty Nesters

■ Families with Teens

■ Retired

■ Young Families

■ Young Singles

Welcome, administrator

Admin - My Account - Admin - Reports - Deliver - Help - Log Off

New Column New Page Properties

Key Metrics

Demographics

Psychographics

Lifestage Segment	Total Product Count	Products per Customer	Total Assets	Total Profitability
Dinks	1,725,053	2.30	\$8,514,896,366	\$371,519,000
Empty Nesters	2,681,563	2.55	\$55,220,791,311	\$309,359,230
Families with Teens	2,401,192	2.40	\$26,206,477,568	\$348,602,730
Retired	2,781,498	2.78	\$88,686,516,090	\$245,735,795
Young Families	1,680,537	2.24	\$9,442,830,751	\$457,661,740
Young Singles	825,345	1.65	\$954,138,771	\$74,439,790

Lifestage Segment	Average Age	Average Income	Average Family Size	% Male	% Married
Dinks	30.5	\$60,012	1.5	40.0%	55.1%
Empty Nesters	55.5	\$70,021	1.5	80.1%	45.0%
Families with Teens	46.5	\$65,023	3.5	90.0%	51.1%
Retired	79.5	\$45,028	1.5	80.1%	45.1%
Young Families	38.5	\$50,013	2.5	70.1%	52.1%
Young Singles	24.2	\$40,048	0.5	0.0%	65.1%

Lifestage Segment	% Fitness	% Outdoors	% Travel	% Domestic	% Cultural	% Bluechip	% DIV	% Technology
Dinks	30.0%	29.9%	30.0%	10.0%	10.0%	40.0%	5.0%	29.9%
Empty Nesters	5.0%	20.0%	5.0%	25.0%	25.0%	10.0%	30.0%	4.9%
Families with Teens	10.0%	25.0%	10.0%	20.0%	20.0%	20.0%	20.0%	9.9%
Retired	5.0%	10.0%	5.0%	30.0%	30.1%	15.0%	15.0%	4.9%
Young Families	20.0%	29.9%	20.0%	15.0%	15.0%	30.0%	10.0%	19.9%

878

884

880

886

830

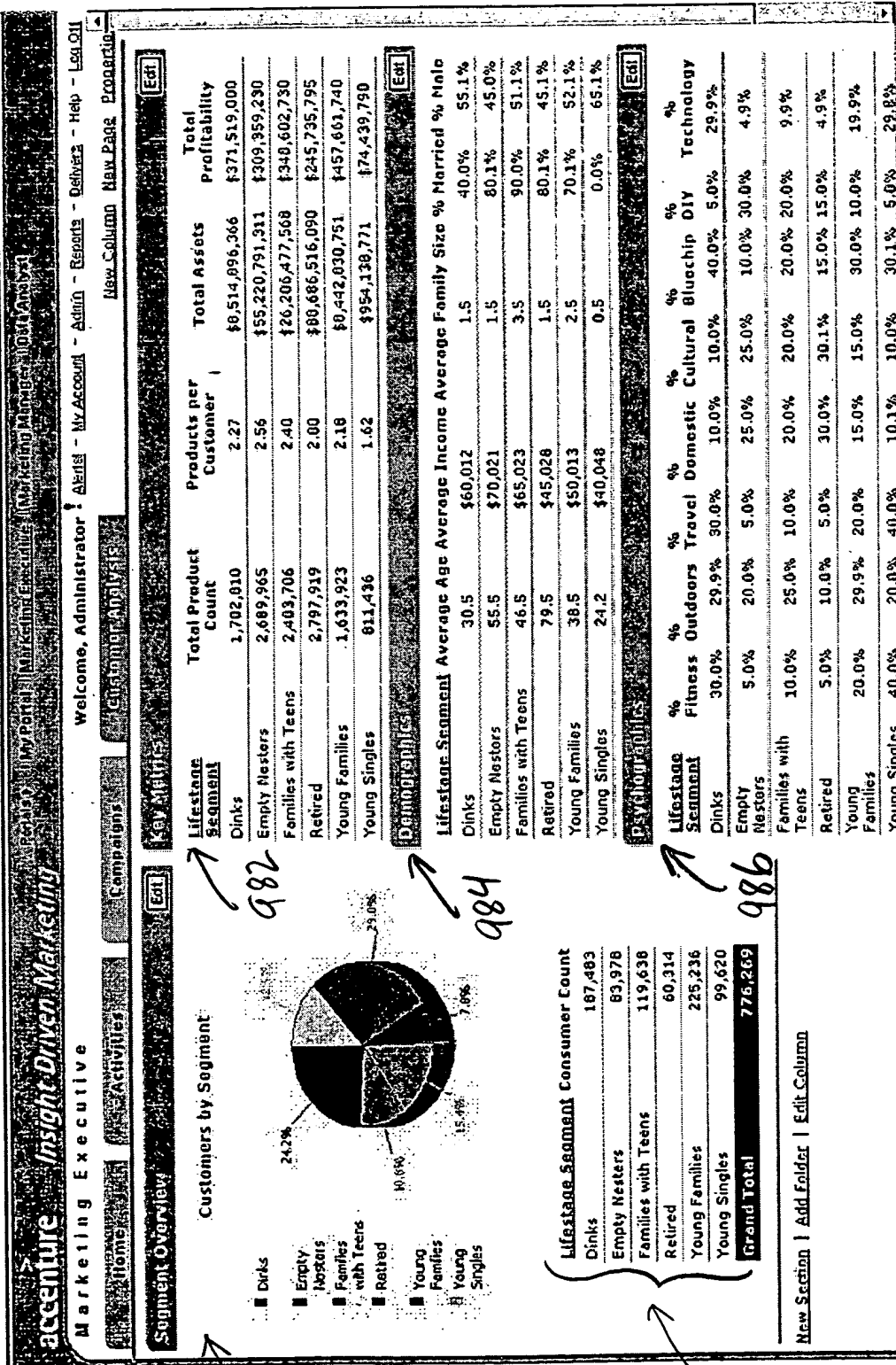
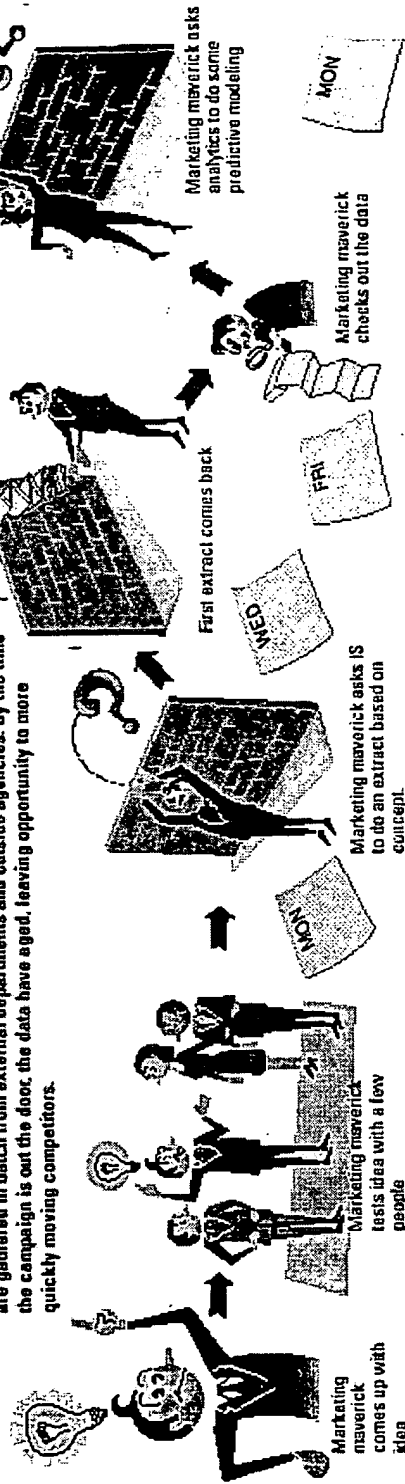


FIG. 13A

ANATOMY OF A MARKETING CAMPAIGN: THEN AND NOW

26 Weeks: 26 WEEKS VS. 26 MINUTES

For many companies today, moving from marketing idea to campaign execution is a long, laborious series of steps. Collaboration is hindered by functional silos. Data are gathered in batch from external departments and outside agencies. By the time the campaign is out the door, the data have aged, leaving opportunity to more quickly moving competitors.



26 Minutes: Gathered in a quality circle, the cross-functional marketing team views analysis of real-time data, brainstorm ideas, and assigns responsibilities. With integrated tools and data at their fingertips, they are able to move quickly, employing technology to integrate customer data, content, and fulfillment to deliver the marketing campaign—getting it right the first time.

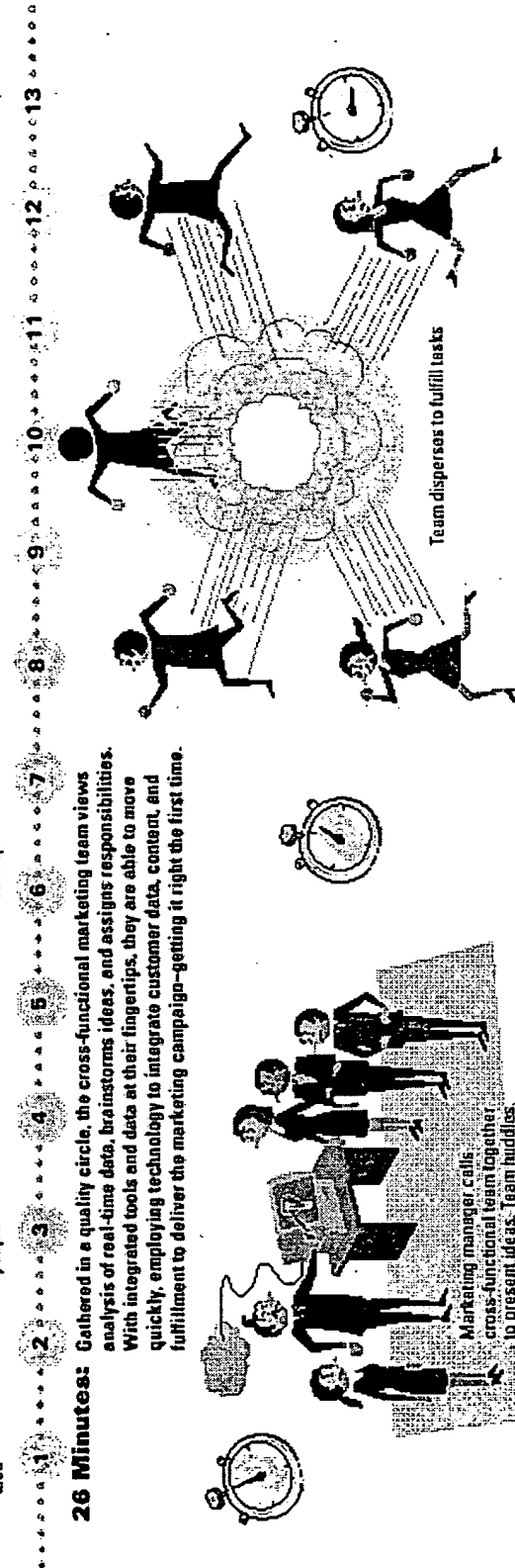


FIG. 13B

